



Mid-Willamette Chapter

<http://oatc-oregon.org/Mid-Willamette>

August 2008

Meetings

August Meeting will be Wednesday 8/20 in Lebanon at Wing Ming's. The address is 1170 South Main St. and their phone number, should you need it, is 258-5889

No-Host dinner beginning at 5:45. Business meeting at 6:30. Education will begin at 7:00.

News From the Editor

It has been decided that the newsletter will be sent via email only starting with the November issue. Please read more about this on page 4.

Thank you
Jo Anne Vetter

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Newsletter Contact

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Deadline: Please submit information by the first week of the month

President's Corner *Message from the President*

Hear Ye Hear Ye Hear Ye

Be Here Ye! This is the monthly meeting where we will be covering a number of items you'll want to hear about. So, Be here ye! Meeting Night changes, Scholarships, drawings,... Lots 'o stuff.

We have a number of exciting things going on this Summer and for the remainder of the year. Please remember, too, that this month's meeting is where we will have a very special gift for the person who can answer the challenge I set out at last month's meeting.

I hope to see many, most, or all of you at this month's meeting. Bring your thoughts and ideas on how we can improve our Chapter's draw, grow our organization, improve our activities. Come on in and join in the fun.

On a more business focus (we can't have fun all Summer), Congress is on recess right now, but important issues are still being addressed or looked at by some officials and staff members. One concern is regarding Identity Theft issues. The IRS is expected to make some substantial moves towards helping taxpayers protect themselves in cases of ID theft activities. Stay tuned for more information on this and many more important dealings at Government - USA (www.usa.gov).

See you soon,

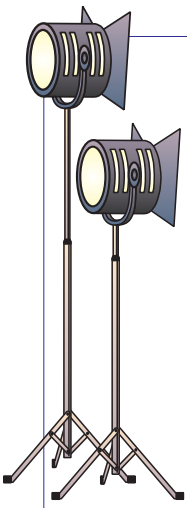
President Bill McKinney

(Again this Picture is really Bill -- and yes the uniform is real -- and do you think that wearing a hat had anything to do with the amount of hair he has or doesn't have now??)



This month's education will be on IRS Audits - something we all need to know about. Our speaker is Diane Pallas - please read all about her on page 2. This will be our last meeting in Lebanon - next month we are back to Corvallis at Tommy's 4th Street Bar an Grill.

Next month Kari has someone from ODR coming to cover Real Estate withholding tax.



Diane Pallas, E.A., L.T.C.

Diane is a former IRS agent, with over 16 years of experience in income tax auditing, department management, and instruction. She is the Consultant & Owner of her own business, Diane E Pallas Forensic Accounting and Tax Consulting, located in Portland. The following is from her bio:

- * Instructed Continuing Professional Education at Portland Community College, communicating complex tax code issues.
- * Adjunct Instructor at Portland Community College teaching Individual Tax.
- * Adjunct Instructor at Pioneer Pacific College teaching Payroll Accounting and Corporate Accounting, Fundamentals of Accounting, Cost Accounting, Advanced Accounting & Microcomputer Accounting .

Internal Revenue Agent

Internal Revenue Service
1988 - 2004

- * Successfully accomplished audits for individuals, S corporations, midsize C corporations, partnerships and trusts, and abusive schemes utilizing solid research and strong computer skills.
- * Consultant to other agents regarding passive activities manufacturing and trust audit issues, resulting in increased efficiency and positive results.
- * Chosen among entire pool of IRS Revenue Agents as consultant to agents nationwide, successfully addressing questions involving one of the most complex Internal Revenue Code Sections (passive activities).
- * Instructed newly hired employees utilizing outstanding organization, presentation, communication and listening skills, enabling new Revenue Agents to confidently begin fieldwork.
- * Managed Revenue Agent group with 12 agents in five different locations, ensuring audits completed timely and accurately, as well as addressing individual concerns.

Speaking & Instruction

Diane teaches income tax at PCC. Diane has taught IRS new hires and continuing education classes for the IRS. She has also spoken before the Oregon Association of Tax Consultants, and teaches continuing professional education to other accountants.

Education

M.S. Accounting
State University of N Y at Binghamton
Phillip M. Piaker Award for Excellence in Accounting

B.A. History, Minor in Education
Adelphi University, Garden City, NY
Phi Alpha Theta Honor Society

**** IMPORTANT NOTICE ****

There will be a vote at the next meeting on moving our meeting date from the 3rd Wednesday to either the **1st Tuesday** of the month or the **4th Thursday** of the month. *These choices were reported in the last newsletter incorrectly - your choices are the 1st Tuesday or the 4th Thursday.*

If you are unable to be at the meeting to vote please let Bill know which you prefer. Bill's email address is: mckinneybilltaxconsultant@hotmail.com Or you can contact him on his home number: 541-259-4570 or his cell number: 541-990-6088

We will be including a copy of the previous month's General Business Meeting Minutes in the newsletter so that those of you who can't make it to the meetings have the opportunity to keep yourselves informed.

Mid-Willamette Chapter OATC
Minutes General Meeting, Wednesday, July 16, 2008
Wing Ming's Restaurant, Lebanon, Or.

The meeting was called to Order by President, Bill McKinney at 6:34 P M with 20 members present. The President welcomed members.

Additions to the Agenda were listed: Membership, NATC and OATC Cookbook.

The minutes of the 6/18/08 meeting were read. Corrections were made as follows:

- 1 July and August meetings will be held at Wing Ming's.
- 2 September through December meetings will be held at Tommy's in Corvallis
- 3 The sentence referencing the December meeting was deleted.
- 4 In Unfinished Business the word submitting was substituted for admitting.
- 5 Under New Business Carol Moore is OATC Office Administrator.

JoAnne Vetter made a motion seconded by Sharon Starr to accept the minutes as corrected. Motion carried.

There was no Treasurer's report as the Treasurer was not in attendance at that time. Bill McKinney reported that Tom was feeling much better.

First VP, Tena Fitzmorris reported she is working on the Chapter Fall Seminar. The first speaker she contacted had to decline. She has several other leads.

Newsletter Editor, JoAnne Vetter said she received material late for the newsletter this month and was expecting the newsletters to be out in a timely manner in the future. She again requested email addresses. She expects to email to everyone within the next 2 to 3 months except people that do not have email or Internet access. Those people will continue to receive regular mailed newsletters.

Bill McKinney reported being at both Convention and Officer Training and said lots of things are happening on Chapter, State and National levels.

There was continuing discussion on changing meeting night. Debra McKinney moved the decision be postponed to next meeting with a choice of the 1st Tuesday of the month or 4th Thursday of the month. Cathy Baker seconded the motion. Motion carried.

New Business: Board meeting potluck will be held at the McKinney home at 970 S 9th St. in Lebanon on Saturday 7/26/08 at 4 PM. All members are welcome, but please RSVP.

State Membership Chair, Debra McKinney spoke on membership needs. Dues are diminishing and expenses are rising. There is a need to increase member numbers or dues dollars. Cathy Baker volunteered to be Chapter Membership Chair.

Internal Audit: Bev Diercks, Gisela Zerkel, and Bonnie Davis have volunteered to review the Chapter books and submit the report to the OATC Treasurer.

Beverly Diercks sent a copy of the OATC cookbook around for people to look at. They will be available with the Group Services orders.

Bill McKinney said there would be a contest with a prize given to the person that guessed his age in the picture on the June Chapter newsletter.

NATC was discussed briefly. OATC will put to a vote whether to continue affiliation as an Association with NATC. There will be a mailed ballot with explanations of both sides of the issue in the near future. Also it was mentioned to watch the NATC website to vote for the 2008 2010 officers.

Tom Dundas requested bills from convention for any Officer's attending so that he can close the fiscal year books.

Meeting Adjourned.

Education followed presented by Bill McKinney with the latest on AMT. There were 23 present at education.

Respectfully Submitted,

Beverly Diercks
Secretary Pro-Tem

Oregon says "As If" to Domestic Partners filing for '08

The Oregon Department of Revenue offered tax preparers a glimpse of how the State plans to process TY08 returns for Registered Domestic Partners. Sample "Filing Status" forms were circulated for review at the July 25th liaison meeting of Revenue staff and Tax Practitioners. Dee Brinlee, from the Policy & Systems group, facilitated the presentation.

The sample forms for Oregon '08 offer seven instead of five selections for Filing Status as follows: (1) Single, (2a) Married Filing Jointly, (2b) Registered Domestic Partner Filing Jointly, (3a) Married Filing Separately (Spouse's Name) (Spouse's SSN), (3b) Registered Domestic Partner Filing Separately (Partner's Name) (Partner's SSN), (4) Head of Household (Person Who Qualifies You), (5) Qualified Widow(er) with Dependent Child. As before, you check only one box. Taxpayers who are Oregon Registered Domestic Partners MUST choose either (2b) or (3b), according to Dee Brinlee. They no longer have the option to file two Single returns or one Head of Household return if one partner is the dependent of the other.

However, since the Federal government does not recognize domestic partnerships, these tax payers will be filing differently for Federal and for Oregon. AND they must include an additional "As If" MFJ Federal return with their Oregon filing. Sound like a lot of extra paperwork? It is. First you generate two single returns for Federal. Then each will need "As If" married Federal returns. Then, using the "State Only" software option, you generate the new Domestic Partner returns feeding off of the fake Federal married return. And attach copies of everything with your Oregon filing.

If you are paper filing (instead of electronic filing), you need to mail Oregon both of the real Single returns for Federal, AND the "As If" married Federal return, AND the Domestic Partnership Oregon return. Write OREGON "As If" REGISTERED DOMESTIC PARTNER across the top of the fake Federal married return.

And while you're at it, don't forget to factor in the Economic Stimulus Checks when you bring across the Federal Tax Subtraction (combining them from the separate Federal filings for the "As If" MFJ return) before creating the new Oregon DP return.

Also noted from the July 25th meeting: (1) Brian Wozniak of the IRS announced that this fall's IRS Tax Symposium will be October 31st (as if that date isn't scary enough!); (2) and Ron Wagner of the Oregon Tax Board reported a 15% lapse of renewing consultants.

NEWS FROM THE EDITOR

In an effort to cut costs we have decided to follow the lead of the OATC State office and limit the number of newsletters that will be mailed via the post office. So this is one of three of the last newsletters that we will be mailing. We will also mail the next two issues but after that the only ones that will be mailed will be to those who have contacted me and requested a mailed copy. I can be reached via phone at 541-928-3101 (my office) or 541-981-0631 (my cell). If I have your email address you will continue to receive the newsletter via email. If you don't have email but have access to the Internet you can log onto the OATC website and view or print the newsletter from there. The website address is: <http://oatc-oregon.org/Mid-Willamette>. Thank you, Jo Anne Vetter, Newsletter Editor

News From The
IRS



NATIONAL PHONE FORUMS AND WEBINARS

Correspondence Examinations "Understanding the Process and Working Together"

August 20, 2008 and August 26, 2008

Visit www.atevent.com and sign up today for this important, informative event.

August 20, 2008

CONFERENCE ACCESS CODE

435439 – 7:00 a.m. (PDT)

544660 – 10:00 a.m. (PDT)

624029 – 1:00 p.m. (PDT)

August 26, 2008

CONFERENCE ACCESS CODE

711418 – 7:00 a.m. (PDT)

578357 – 10:00 a.m. (PDT)

Learn about correspondence examinations

- Correspondence examinations role in tax compliance
- How the IRS selects returns for examination
- How the notice process works
- The examination workflow
- How to respond to notices
- Issues raised by tax professionals and IRS' actions to address them

Register online at the [AT&T TeleConference Services Web site](http://www.atevent.com) (www.atevent.com). Reservations are limited, so register early. You will receive a Personal Identification Number that you must use to join the conference. If you have never registered with AT&T for a prior phone forum, you will first need to click on create a profile. If you require special accommodations (for example, Braille, large print or interpreter services) please contact Shane Ferguson at nationalphoneforum@irs.gov.

We will e-mail presentation materials the day before the forum. If you do not receive this e-mail by noon the day before the event, please e-mail us at nationalphoneforum@irs.gov to request the materials.

Dial in on the date of your choice:

Toll free: (866) 216-6835

Toll: (913) 227-1220 Dial in 3 to 5 minutes before the scheduled time

- Enter your access code, then the pound (#) sign
- Enter your PIN, then the pound (#) sign
- Your line will be placed on hold until the conference begins

A question and answer period follows the main presentation; however, due to the public nature of the call, we will not be able to address specific client issues.

CPE credit awarded to qualified participants. For more information visit our website under [National Phone Forums](#).



Mid-Willamette Valley Chapter
C/O 31551 Oak Plain Drive
Halsey OR 97348

Return Service Requested

***Contains Dated
Material***

DISCLAIMER: *All material enclosed in this newsletter is as accurate and reliable as we can provide, but the possibility of human or mechanical error does exist. All persons using this information are cautioned to use all sources of information to arrive at a decision of tax law.*

Association Officers

<u>Office</u>	<u>NATC</u>	<u>OATC</u>	<u>MW Valley Chapter</u>
<i>President:</i>	Jayne Williams 541-343-5336	Susan High 503-655-3737	William McKinney 541-990-6088
<i>1st VP:</i>	John Bell 503-626-3342	Janice Wyss 503-762-1432	Tena Fitzmorris 541-971-1522
<i>2nd VP:</i>		Beverley Diercks 503-394-3510	Kari Lasswell 541760-0124
<i>3rd VP:</i>		Eric Arnoldus 541-963-8304	
<i>Secretary:</i>	Barbara Culver 253-859-8567	Cheryl Brown 541-975-1850	Brandie Stucky 541-541-8299
<i>Treasurer:</i>	Michael Graves 360-588-8077	Laurie Mills 503-928-3101	Tom Dundas 541-258-5600
<i>Board Members:</i>			Dennis Secrest Sharon Starr Jo Anne Vetter
<i>Past President:</i>	Linda Mussen 503-292-6252	Denny Purkey 503-620-3061	Ave Giddings 541-619-2614